OrgPublisher 11
End User Help
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Making the Chart Work for You

This document will help you make the most of the OrgPublisher feature-rich published chart. Depending on the choices made by your chart Administrator, all of these features may not be available to you.

**Note:**

*Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available. In addition, published real-time charts do not contain the summary reporting feature.*

If you are an Administrator who will publish planning-enabled charts, the published chart will contain a specific toolbar with a Planning button. This button may look different, depending on whether your published chart is enabled for both org modeling and succession or just one of the planning options. Click the button if you or designated planners want to create, open, and delete planning charts for organizational modeling or succession planning. Additional online help is provided for the planner within the planning chart. See the *Organizational Planning for Administrators* topic.

Once you open a published chart in your browser, you can view an organizational chart which may contain photos and other pertinent information. In addition, you may be able to see a:

- **List View**, often used as an up-to-date phone list
- **Profile View**, often displaying a photo and additional information about an employee
- **Summary View** providing numerical information, such as sales dollars, percentages, or a graph version of the summary totals.

If made available by your chart Administrator, you can send a chart to Microsoft® PowerPoint via the print preview feature, as well as view search results in Microsoft Excel.

Depending on which features your administrator has made available, you can perform several tasks using toolbar buttons, or you can use the **Search View**, accessed through the **List View**, to create and save your own groups, and much more.

Real-time charting does not offer the following features:

- summary/analytic reporting
- compound searching
- group-based searching

If you open a real-time chart you cannot conduct complex searches in order to create groups, access summary reporting, or save your own groups.
Working with a PluginX Chart

In addition to viewing information, you can, depending on the choices of your administrator, perform any number of tasks.

Your administrator may have published your chart as a Thin Client, in which case the scope of some features may be limited. Review the How to Tell if You're Working with a Thin Client or PluginX Chart topic below for additional information.

If you have specific questions that these help pages cannot answer, please contact your administrator for more information.

How to Tell if You're Working with a Thin Client or PluginX Chart

Your chart Administrator may have published your chart as a Thin Client, in which case the scope of some features may be limited.

Click on the OrgPublisher button in the toolbar. The About text box tells you whether you are using a PluginX or Thin Client chart. The thin client chart format enables your chart Administrator to publish a chart without placing add-on controls to your PC, but at the same time, some of the OrgPublisher features are not fully enabled. See the list below for details.

There are several reasons why you should know that you’re working with a Thin Client chart.

- Depending on the choices made by your chart Administrator, all views are available except the Tree View.
- You can copy a chart only by using your browser Edit>Select All>Copy menu option.
- You can copy only the visible records in a search results list by selecting the list and using the browser Edit>Copy menu option.
- The Search View does not contain a separate List View pane.
- You cannot resize or move the views.
- You can use the toolbar Print button to print only the Chart View, as a Book Style, via an Adobe PDF (portable document format) document.
- You can click on hotspot links that may be in the chart or Profile View, but a Smart Links list (list of all hotspot links associated with that field) is not available.
- The My groups tab is not available, and you cannot save or edit, ad hoc groups in Thin Client.
- The Send email to group feature is not available.
- You cannot zoom in or out in the Chart View.
Published Chart Toolbar

The following table illustrates toolbar buttons available in published charts, based on what your chart administrator enables at publishing time.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Saves the chart. The Save As dialog opens so that you can assign a name to the file.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Prints the chart or a specific chart view selected in the Print Wizard.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Displays the chart as it will look when you print it and is only available in the Chart View.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Opens the system Print Setup dialog.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Displays the chart as it will look in Microsoft® PowerPoint and is only available in the Chart View.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to move the Chart View to the top center of the displayed drilling level.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Use this field to enter your search text. Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to display the Search dialog at the Name tab.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Clicking this button starts the chart search on a box-to-box basis for the next instance of a matching record.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Clicking this button designates the selected box as the top of your chart for the selected style.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to display the chart from the highest box in the hierarchy.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to display the Search dialog at the Name tab.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to display the 9 Box Matrix for Succession Planning.</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Click this button to display this view. The Profile View defaults to the right side of the window, but you can...</td>
</tr>
<tr>
<td><strong>Button</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Click this button to conduct queries in the published chart.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td>Use this button to display chart components in outline format and to navigate through large charts. Select a chart component in the tree and the box containing that component is placed in the center of the Chart View.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td>Click this button to view a report of summary fields from your organizational chart, either in a summary report or a graph, if applicable.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td>Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td><strong>Layout 1</strong> - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td><strong>Layout 2</strong> - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td><strong>Layout 3</strong> - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td><strong>Layout 4</strong> - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td>Click this button to view the person's chain of command, the reporting hierarchy upward from this person in the chart.</td>
</tr>
<tr>
<td><img src="image" alt="Chart" /></td>
<td>In the published PluginX chart, click the Reset style to published value button.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Click this button to access the Web page containing the PDF Help file for published charts.</td>
</tr>
</tbody>
</table>
New with OrgPublisher 11

OrgPublisher 11 includes new features contained in this section.

**Using the Bulk Editor in Custom Fields Dialog**

When working with a large number of custom fields, you can use the Bulk Editor dialog, accessed from the *Custom Field Properties* dialog.

1. Click **Bulk Editor** in the *Custom Field Properties* dialog.

![Bulk Editor in Custom Field Properties Dialog](image1)

**Figure 1.**

The *Custom Field Bulk Editor* dialog opens, displaying all custom fields in your database.

![Custom Field Bulk Editor](image2)

**Figure 2.**

2. Select individual custom field records, or select the check box at the top of the first column to select ALL custom fields.
3. Select individual check boxes for custom fields that you want to allow end users to search in the published chart. Or, select the check box at the top of the **Searchable** column to allow end users to search for All custom fields in the published chart.

![Fig 3](image)

**Figure 3.**

All check boxes in the column are selected.

![Fig 4](image)

**Figure 4.**

4. Assign individual custom fields to position types by clicking **Assigned to** at the top of that column.

![Fig 5](image)

**Figure 5.**

![Fig 6](image)

**Figure 6.**
5. The *Update Assigned Custom Fields* dialog opens. Select the **Position type** and the field you want to display the custom field. Click **OK**.

![Update Assigned Custom Fields dialog](image)

**Figure 7.**

All custom fields now display the position type selected through the Bulk Editor.

![Assigned fields](image)

**Figure 8.**

6. Click **Done** to accept the changes and close the dialog. Or, click **Undo all changes** to clear all of your selections. Click **Done** to close the dialog.

**Using the Bulk Editor Option in Profile View**

If applicable, you can select which fields to display in the *Profile View* by selecting the check box associated with the field. Now, you can also select all fields.
To select all available fields to display in the Profile View using the bulk editor feature, click **Check All**. To reverse that action, click **Uncheck All**.

![Configure Profile View](image)

**Figure 9.**
General Chart and View Capabilities

The following items are "how to" instructions for general chart and view tasks. Some of these features may have been disabled by your chart administrator.

Note: Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available. In addition, published real-time charts do not contain the summary reporting feature.

Some features in this section may have been disabled by the chart administrator.

Adjusting Column and Row Widths

1. To resize a column or row width in the List View, Profile View, Summary View, or Tree View, place the cursor in the column or row heading on the line separating one column or row from the next.

2. Click and hold down the left mouse button. The cursor changes appearance.

3. Drag the column or row line to the width you want and release the mouse button. The column or row is resized.

Copying a Hyperlink to a Person in the Chart

Depending on how your administrator published your chart, you can copy the link to a person. You can copy the link from the person's Name, Job title, or Box title.

1. Open the published chart and right-click on a person's name, the job, or the box title. A list of menu options appears.

2. Select the Copy hyperlink to person or Copy hyperlink to box option.

3. Open an application that can recognize and use hyperlinks, such as an email client, and paste the link into the application. The hyperlink text appears.

For instance, you can copy a link to a person in a chart, paste the link into an email message, and send the email to a supervisor who should review information in this person's chart box. The supervisor clicks on the link, and the chart opens at that person's location in the chart.
**Note:** If there are multiple people listed in a box, OrgPublisher opens the box and selects the first person listed.

**Copying the List View**

You can copy information from the *List View* and paste it into other Microsoft Windows applications.

1. To copy a record, highlight the record in the *List View* and right-click.
2. Select **Copy selection** from the options list.
3. Click the Copy button in the toolbar.
4. Open the Windows application and click the Paste button. The selection displays in the new application.
5. To copy the entire list, right-click in the *List View*, and select **Copy whole list** from the options list.

**Note:** If you are working with a very large chart, because of its size, the Copy whole list option is not available. You can, however, use the Search feature and select the Everyone group, then copy the list to the clipboard.

**Copying a Workforce Analysis Graph**

If you can view a workforce analysis graph, you copy the graph to another Windows application.

1. In the *Summary View*, click on the **Graphs** tab.
2. In the **Graphs** tab, verify that you can see the entire graph and legend, if applicable. If not, resize the **Summary View**.
Figure 10.

3. Click the Copy button. The graph is copied to the clipboard, and you can paste the graph into another application.

You can also print a workforce analysis graph using the *Print Wizard*.

**Copying the Summary View**

You can copy information from the *Summary View* to other Microsoft Windows applications.

*Note:* Published real-time charts do not contain the summary reporting feature.

1. Right-click in the *Summary View*.

2. Select *Copy Summary* from the options list. OrgPublisher highlights the summary information.

3. Click the Copy button in the toolbar.

4. Open the Windows application and click the Paste button. The summary information displays in the new application.

**Embedding or Copying Org Charts**

You can embed a chart in another COM automation-compliant document. You can also use *Previewing a Wall Style Chart* to copy a modified chart.

1. Select a portion of the chart by highlighting a box or hierarchy of boxes.
2. Click the Copy button.

3. Open a Windows application and click the Paste button. A copy of the chart displays in the document.

**Going to the Top of the Displayed Chart**

You can return to the top of the current chart level in the *Chart View* after you have scrolled to a specific box or after you have performed a search.

- Select **View** from the menu bar, then **Go to top of displayed chart** from the pull-down menu.
- You can also use the Go to top of displayed chart button from in the toolbar.

OrgPublisher displays the box at the top of the current drilling level and its reporting boxes.

**Locating Information with the List View**

- To use the **List View** to locate information in the chart, click on the name, position or custom field in the **List View** that you want to find. The chart re-centers, and the matching record is highlighted in the chart.
- To use the **Chart View** to locate information in the **List View**, click on the name, position, or field in the chart. The matching record is highlighted in the **List View**.

**Locating Information with the Tree View**

You can use the **Tree View** to locate information in the **Chart View**, or to view chart information in an outline format.

If not already open, click the Tree View button in the toolbar. The **Tree View** opens on the right-hand side of the chart window.

1. In the **Tree View**, select the person, job, or custom field you want to find in the chart.
2. Click on that person, job, or custom field.
3. The chart re-centers and the matching record is outlined in red in the **Chart View**.
Maximizing Docked Views

1. Open the view, if enabled by your chart administrator, you want to maximize.

2. Click the Maximize button, typically in the upper right or upper left corner of the view. The view increases in size to fill the screen.

3. Click the contract maximized view button or the Restore button, typically in the upper right or upper left corner of the view, to set the view to its previous size.

Note: Only one docked view can be maximized at a time. If a second view is maximized the first view returns to its original size.

Opening a Password Protected Chart

Depending on how your chart Administrator published your chart, you may be required to use a valid password to open it.

1. The Enter Password text box opens when you access a protected chart in your browser.

2. If you know the password to open the chart, type the password in the Password field.

3. If the Remember my password option is enabled and you want to open the protected file in the future without entering the password again, select this check box.

4. Click Unlock to open the chart.

5. If you do not have a password, click Cancel and contact the publisher of the chart you want to open.

Opening and Pinning the Style View

You can open and pin the Style View while you work in the published chart if your Administrator has made more than one style available.

1. Click the Style View button to display the list of styles for the chart. The Style View opens on the left side of the OrgPublisher window.

2. Highlight a style from the list and click on the "pin" in the upper right corner of the view. This makes the Style View easily accessible while you work.
3. When you close the **Style View**, an arrow displays to the right of the style name in the Style bar.

   The Style bar also displays the group name, if groups exist in the chart, in the right-hand corner.

   If enabled by your chart administrator, you can also view the styles list as tab options.

**Resetting Maximized or Docked Views**

There are two methods to reset maximized views.

- Click the contract docked window button at the top of the view if the views are docked at the top or bottom of the **Chart View**.
- Click the Reset style to published value button in the Views toolbar.

**Note:** When working with several views, docking them, maximizing, and moving, you may experience problems. Close all docked views and then reopen each view you want to use.

Follow the instruction above to reset the docking window layout. This sets the views back to a place where you can restart the docking or maximizing of views you want.

**Selecting Drilling Options**

If enabled by your administrator, you can move up or down in the **Chart View** based on a specific hierarchical tree with these buttons. A button containing an arrow pointing downward moves down through the chart. If there are tiers of the chart above the viewed area, an arrow pointing upward moves toward the top.

1. To use drill-up and drill-down custom levels, first set the number of custom levels to display.

2. Click on the Drill-up/drill-down button to turn this feature on or off.

3. Scroll through the chart until you see the drill-down arrow.

4. Click on the arrow to move down the chart.

5. Click on the arrow pointing upward to move back up the chart.
Other ways to navigate around a chart are:

- Find Next
- Top of Chart
- List View
- Search
- Scrolling

**Sending the Chart to Microsoft PowerPoint**

You can copy the chart directly to Microsoft® PowerPoint, providing enhanced chart graphic quality and flexibility within presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

*Note:* This feature disables the header and footer options, as well as the index or group icon legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.

1. In the Main toolbar, click the Send to PowerPoint button. The PowerPoint Preview list box opens.

2. Select either the Wall chart preview or Book style preview radio button. Click OK. The Microsoft PowerPoint Preview window opens.

3. Make your modifications in the Wall style or Book style preview. If you click Settings in the Book Style preview, the Book Style PowerPoint Settings dialog opens. Follow the Preview and Print a Book Style Chart procedure to choose the PowerPoint settings.

4. Click Send. The Send to PowerPoint dialog opens.
5. In the **Page Range** section, select which pages you want to send to PowerPoint, **Current Page**, **All Pages**, or **Pages** and enter the page numbers or range.

6. In the **Chart Options** section, select the optional chart features you want to send to PowerPoint. These features include **Show Drill Buttons**, **Chart Title**, which allows you to choose **Title is part of image** or **Title is part of slide**, and **Chart Background**, which allows you to choose **Background is part of image** or **Background is part of slide**.

7. In the **PowerPoint Options** section, the default is **Use currently open presentation**. Clear this check box if a current presentation does not exist or you want to choose a different presentation.

8. In the **Image Options** section, select **Copy as metafile** or **Copy as bitmap**.

9. Click **OK** once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.

**Note:** When previewing as Wall Chart the **Show Drill Buttons** option is not available.

**Setting Top of Chart**

If enabled by your administrator, you can select any box you wish as the top of the chart using this button. Head counts for the chart are set to only reflect the count from the selected top of chart box down.
General Chart and View Capabilities

1. To set the top of chart, select the box that you want to see at the top of the Chart View.

2. Click the Set top of chart button.

3. The chart repositions to center the Chart View using the new top of chart.

4. To view the whole chart again, click the Display Whole Chart button.

**Sorting the List View**

1. Open the List View by clicking the List View button in the toolbar.

2. Click on the column heading that you want to sort by. The sort order is retained when you publish the chart. For instance, click on the full name to sort the list alphabetically by last name.

3. Click on the heading for a numeric field, such as telephone number, to sort the list numerically, or on a date column to sort the list by date. The date format must be YYYY/MM/DD.

In addition, the Search View is available within the List View and offers features much like the Search dialog. Columns shown in the List View determine the columns shown in the Search View.

**Understanding Profile View Subheadings**

Depending on your chart administrator, you may see subheadings in the Profile View. Subheadings help organize data fields for better viewing and understanding.

- Open the Profile View, if available, in your chart.
The Profile View displays subheadings, indented one space, with corresponding fields indented two spaces and listed beneath the subheadings. Subheadings group information of the same type for a quicker grasp of available data.

**Understanding the Chart Legend**

The Chart Legend tells you what the icons and colors used in the chart mean, and it takes the place of OrgPublisher’s previous group legend.

Each icon is accompanied by the name of the associated group. Custom colors contain a label describing how they are used in the chart.

**Viewing a Chain of Command**

The Chain of Command mode is available in the View Mode in the OrgPublisher application and the published chart using PluginX or EChart, including the published planning-enabled chart. It is not available in the modeling or succession planning published charts, as these charts are about reassigning responsibilities and positions.
1. Select the chart box containing the person whose chain of command you want to see.

![Chart Example]

Figure 14.

2. The Display Chain of Command button is enabled in the Main toolbar. Click it to view the person's chain of command, the reporting hierarchy upward from this person in the chart.

The Chart View changes to display the selected person's chain of command from the selected box to the top of the chart.

**Note:** This view is affected by the number of levels shown. If the chain of command spans 3 levels, but the chart is set to display only two, just the first two levels in the chain of command are shown.
3. Click the button again to redisplay the whole chart.

If the List View is open, the list changes to reflect the people in the boxes now displayed.

![Figure 16.](image)

If the Profile View is open, it displays the person at top of the chart.

**Using Click and Drag Scrolling**

When the mouse cursor sits over a blank area in the Chart View, the cursor changes to a hand icon. Using the click and drag scrolling feature is another way to navigate through a large chart. This option is always enabled and cannot be turned off.
- Click and hold down the mouse button. The hand closes 🖐️ and allows you to scroll through the chart levels by dragging or moving the mouse wheel in the direction you want the Chart View to move.

For instance, if you want to see the bottom of a chart level, you want the Chart View to move up. Click the hand in the background of the view and drag upwards.

**OrgPublisher Scrolling Enhancement**

Chart scrolling contains more of an iPod® scrolling feel. As you drag to move a chart, it will appear more as a “toss.” As you release the mouse, the chart continues to move with a gradual slow down to its new position.

**Using OrgPublisher in Accessibility Mode**

The OrgPublisher PluginX chart can be accessed by JAWS® for Windows screen reading software for the blind and visually impaired.

The following functions are supported in the PluginX chart via the keyboard.

<table>
<thead>
<tr>
<th>Functions</th>
<th>Keyboard command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find</td>
<td>F key</td>
<td>Opens the Enter Search text dialog. This is equivalent to an All fields search; for example, type a first or last name, or a job or box title. Press the space bar or Enter to begin the find, or press TAB to the Cancel button.</td>
</tr>
<tr>
<td>Find Next</td>
<td>N key</td>
<td>Performs a &quot;find next&quot; matching record function if a previous search occurred.</td>
</tr>
<tr>
<td>Zoom in</td>
<td>Ctrl+</td>
<td>Raises the zoom factor by one level.</td>
</tr>
<tr>
<td>Zoom out</td>
<td>Ctrl-</td>
<td>Lowers the zoom factor by one level.</td>
</tr>
</tbody>
</table>

**Note:** JAWS hot keys, such as F for the next form field and L for the next list, are disabled. OrgPublisher PluginX accessible charts do not contain form fields, lists, links or tables. If you use a high zoom-in level, you may notice JAWS takes a little longer to read the screen.

You can navigate through the chart using the Up, Down, Left and Right arrow keys on your keyboard. The Drill-up/Drill-down to another level function occurs automatically.

- When a chart is opened, the top box is automatically selected.
- A box must always be selected. Drilling on "white space" will not de-select the current box.

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- Only one box is selectable at a time. Hierarchical "trees" are not available.
- To access a sibling of a selected top box with a drill-up button, click the up arrow first, then the left or right arrow. If the requested sibling does not exist, the original box will remain selected.
- If JAWS is running and you tab away to another application, the focus on the chart may be lost. To regain focus, press **Alt TAB** to go to another application and then press Alt TAB again to refocus on the chart.

**Using the Symbol Indicators in the Tree View**

If enabled by your administrator, you can use the *Tree View* to locate information in the *Chart View*, or to view chart information in an outline format.

Open the *Tree View* by clicking the Tree View button in the toolbar. The Tree View opens on the right-hand side of the chart window.

Symbols used in the *Tree View*, their function, and locations are:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Function</th>
<th>Location on the Tree</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>A component is collapsed and can be expanded to show more components by clicking on the plus sign. Corner of the branch connected to the chart component.</td>
<td>Corner of the branch connected to the chart component</td>
</tr>
<tr>
<td>-</td>
<td>A component is expanded and can be collapsed by clicking on the minus sign. Corner of the branch connected to the chart component.</td>
<td>Corner of the branch connected to the chart component</td>
</tr>
<tr>
<td>&gt;</td>
<td>More boxes are available for display by double-clicking the box containing the greater-than sign chart box.</td>
<td>Chart box</td>
</tr>
</tbody>
</table>

**Using the Tabbed Style Selector**

If enabled by your chart administrator, you can view styles available in your chart by using tabs.

Click on a tab to look at the selected style. The published chart tabs look like this:

![Tabbed Style Selector](image)

*Figure 17.*
Using Chart Action Buttons

Chart action buttons are an easy way to view and access what were previously the right-click menus for each data field in the Chart View. The chart administrator chooses the Action button options for published charts. This feature is available in the OrgPublisher application and in charts published as PluginX or EChart rich client, as well as OrgPlan charts.

1. Open the chart and select a data field in a chart box, for instance the job title. The Action button appears to the right of the chart box.

![Figure 18.](image1)

2. Click the Action button. The available menu options appear.

![Figure 19.](image2)

Select the option you want to use and proceed with your task. If you choose not to select a menu option, click in a blank area of the chart to close the menu.

Using Dynamic Chart Layouts

OrgPublisher allows you to dynamically select a chart layout.

1. Open a chart and click the Select the layout style for this chart button.
2. The drop-down list displays layout options. The current layout is selected. Click the layout structure you want to use in the chart.

![Image](image1.png)

Figure 21.

The chart immediately changes the displayed layout.

**Viewing the Hover Profile**

The *Hover Profile* is a quick way to view the most important employee information without opening the *Profile View*. The pop-up profile is anchored to the upper-right or, depending on the location in the *Chart View*, the upper-left, of the data element that the mouse is over.

1. Move the mouse cursor over a data element in the chart, a person, a job, or a box title, and let it hover there. The *Hover Profile* opens.

![Image](image2.png)

Figure 22.
A scroll bar is available if the number of displayed fields requires it. The *Hover Profile* displays the selected chart color scheme. Depending on your chart administrator, the profile may also contain subheadings with associated fields listed beneath the heading.

2. When you have finished reviewing the information in the *Hover Profile*, click somewhere else in the chart to close it.

**Viewing Information in the Profile View**

If enabled by your supervisor, the *Profile View* displays additional information for a selected chart box, job, or person.

1. Open the *Profile View* in the chart by clicking the Profile button.

2. Click on a name in the *Chart View*.

![Profile View](image)

**Figure 23.**

The *Profile View* displays information associated with the selected name.

3. Click the Profile View button again to close the view.

**Viewing the Matrix Reporting Hover Display**

1. Open a chart that contains multiple relationships/matrix reporting icons.

2. Move the mouse cursor over the matrix reporting icon in a box. The Matrix reporting hover display appears, listing that person and all report to instances.
3. You can move the cursor to close the hover display, or you can pin the matrix reporting hover display to the Search View by clicking the Pin button.

**Viewing the Tabbed Hover Profile**

If your administrator has created and published a chart with subheadings in the Hover Profile you may have the option to view the information with tabs representing each subheading.

- Move the mouse cursor over a box title, job title, or name in a chart box, and let it hover there for a few seconds. The Hover Profile opens, if available.

![Profile View](image)

Figure 24.

A vertical scroll bar is available if the number of displayed fields requires it. The Hover Profile displays the subheadings as tab options.

**Viewing the Tabbed Profile View**

If your chart administrator has created subheadings in the Profile View you can view the information with tabs representing each subheading.

The Profile View opens with custom fields grouped under named subheadings in tab options.
Figure 25.

You can use the tabs or click the tab button to remove the tabs.
Search for and Work with Groups

The following items are “how-to” instructions for searching for information in the chart and saving related information as groups.

**Note:** Published real-time charts provide single field searching capabilities; complex or group searching and saving My groups are not available.

**Searching Charts**

Search your org charts to locate information using the Search dialog or the Search View. You can specify the chart component, field, and text for which you want to search, as well as use a "Sounds Like" feature to increase your chance of a successful search for a text field.

Searches can be case-sensitive and can match all or a part of the field. You can search a portion of the chart or the entire chart for employee names, job titles, or box titles. The availability of the search feature is dependent upon the publishing format and options chosen by your chart Administrator.

You can also view the search results list in Microsoft Excel.

1. Click the Search button. The Search dialog opens at the Name tab.

![Search dialog](image)

**Figure 26.**

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2. If the word you are looking for is part of a job title, select the **Job Title** tab, etc. If you select the **Groups** tab, click on the group and then select **Search Now**. The following steps apply to **Name**, **Job Title**, **Box Title**, and **All Fields** searches.

3. Type the text for searching. If you have selected a specific box in the **Chart View**, the **Search** dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

4. Click on the **Match** drop-down arrow and select how you want the data to be matched. Choices will vary based on the type of data you are searching.

   The drop-down list indicates where in the field to search. The options are:

   ![Match Options](image)

   **Figure 27.**

   As an example, the **Box Title** is searched for the word "Clerical."

<table>
<thead>
<tr>
<th>If you select...</th>
<th>...results show</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Part of Field</td>
<td>job titles such as “Clerical Assistant,” “Assistant Clerical Manager,” and “Director of Clerical Services”</td>
</tr>
<tr>
<td>Whole Field</td>
<td>only job titles that consist only of the word &quot;Clerical&quot;</td>
</tr>
<tr>
<td>Start of Field</td>
<td>only job titles that begin with the word “Clerical,” such as &quot;Clerical Assistant&quot;</td>
</tr>
<tr>
<td>Not equal to any part of field</td>
<td>all job titles that do NOT include the word &quot;Clerical&quot;</td>
</tr>
<tr>
<td>Not equal to whole field</td>
<td>only job titles that include “Clerical” as part of the title, such as &quot;Assistant Clerical Manager&quot; or &quot;Clerical Assistant&quot;</td>
</tr>
<tr>
<td>Not equal to start of field</td>
<td>all jobs that contain the word “Clerical” in any position EXCEPT the beginning of the title, such as &quot;Director of Clerical Services</td>
</tr>
</tbody>
</table>
   | Sounds Like      | if "clricl" was typed in as the search word, only job titles that consist of words similar to "Clerical"

5. Select **Match Case**, if applicable.

6. Click **Search Now**.

   A list of all matching records displays in the Search results area in the lower pane. You can:
   - Sort any column in the search results.
Click on any record and OrgPublisher will locate that person within the chart.

If you have selected a specific box in the Chart View, the Search dialog automatically selects the Search under selected box check box.

Click on Copy List to Clipboard button and then paste the list into any other Windows application.

Click on Save as Group button to create a group in the My groups tab. This group is available only in the published chart.

Select Add to list below in the Search options section to conduct a secondary search against these results.

Select Search within list below in the Search options section to add additional search results to the list.

7. If you chose to Add to the list or Search within the list below, follow these steps to refine the first search result.

1. Select the appropriate tab to start the secondary search.
2. Key in search criteria and match options.
3. Click Search Now.

Your search results list will be modified.

8. Once you have completed all tasks associated with your search, click Close to exit the Search dialog.

Adding a New Group to the My groups tab

You can add a new group to your chart under the My groups tab by searching for select criteria and saving the results as a group.

1. Conduct your search using one of the Search dialog tabs in the or by using the Search View pane in the List View.

2. When your search result is the way you want it, click the save as group button. The Enter a group name text box opens.

3. Type the name of the group. Click OK. The Search dialog or Search View displays the My groups tab and Filter View include the new group.

Add a Group Using the Right-click Menu

1. In the Chart View, select the name of the person you want to add to a new group.

2. Right-click on the person’s name. The Select a Group text box opens.
3. Click **New Group**. The *Enter a group name* text box opens.

4. Type the name for the group. Click **OK**. The text box closes and the new group is created and the name is added to the **My groups** tab and **Filter View**.

**Adding a Person to a Group in the My Groups Tab**

You can add a person to a group in the **My groups** tab directly from the **Chart View**.

1. In the **Chart View**, select the name of the person you want to add to an existing group.

2. Right-click on the person’s name and select the **Add person to the Group** option. The *Select a Group* text box opens.

3. Click the down-arrow and select a group from the drop-down list.

4. Click **OK**. The text box closes and the person is now included in the selected group.

**Adding a Group Category**

5. Open the **Groups** tab of the **Search** dialog by clicking the **Groups** button in the toolbar, or by clicking the Advanced Search button and selecting the **Groups** tab.

6. Double-click on a group name for which you want to create a category. The Group Editor dialog opens.

7. In the optional Category field, type the name of the category you want to add. The category name appears in the Search Field of the record displaying the selected group criteria.

**Note:**  
The category name is not a searchable field. The **Value**, or group name, is the searchable field.
8. Click **Save**. The **Groups** tab re-displays with the new category name, and the group name indented below it. When selected, the **Category** name is highlighted in green.

![Figure 28.](image_url)

![Figure 29.](image_url)
When selected, the **Group** name is highlighted in blue.

![Image](image1.png)

**Figure 30.**

9. Repeat steps 2 - 4 to add additional categories.

If you want to use an existing category, click the drop-down arrow in the **Category** field and select the name you want to use.

![Image](image2.png)

**Figure 31.**

**Creating New Groups for Planning Charts Using the Group Creation Assistant**

*Note: This feature is available only in Modeling and Succession planning charts.*

The **Group Creation Assistant** provides a series of dialogs which ask the questions needed to create multiple groups at the same time, although you can use the assistant to create a single group.

1. Click **Search** in the Navigation bar. The **Search** dialog opens.
2. Select the **Groups** tab.

3. In the **Groups** tab, click the Group Creation Assistant button. The **Group Creation Assistant Step 1** dialog opens.

4. Click the drop-down arrow in the **Select the field that contains the values you want** field, and select the field you want to search on.

![Group Creation Assistant](image)

**Figure 32.**

5. Type a prefix or name for the group in the **Enter a prefix for the names of the groups** field. Click **Next**. The **Group Creation Assistant Step 2** dialog opens.

   The left pane contains the values available for grouping the data in the field you selected. These values are sorted first by "hit" count (the highest number of records to match the criteria), then alphabetically.

6. Drag and drop the correct value to the right pane.

   **Note:** You can create more than one group by selecting multiple fields.

7. If you want to use multiple values from which to create the group, drag another value from the left pane and drop it on the first value.
8. If you want to create multiple groups, drag a value from the left pane and drop it in the white space of the right pane.

You can create several groups at the same time using single or multiple values in each. When you have created the group parameters you want, click Next.

9. The Group Creation Assistant dialog Step 3 opens, displaying the groups that will be created. If the listed groups are correct, click Finish. If they are not correct, click Back and repeat the applicable steps 4 - 9.
Figure 34.

The **Groups** tab of the *Search* dialog displays the groups that were created using the *Groups Creation Assistant*.

Figure 35.

10. On the Style Bar, click the Groups View button ![Groups View button](image) to display the *Filter View*.

11. Click on group to display it in the *Chart View*.

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Auto Pinning Group or Search Results as Side-by-Side Profiles

You can use new search results or a search result from an existing group to automatically pin profiles (maximum of six records at a time) to the Profile View.

1. Conduct your search in the Search View or Search dialog.

2. Click the Show the search results in the Profile View button. If there are more than six records in the Search Results pane, OrgPublisher selects the first six to display in the side-by-side profile.

   Click the button again to add the next 6 records, repeating the process, if applicable, until all the records you want are in the pinned Profile View.

3. If the search results in less than 6 pinned profiles, you can manually add and pin additional records by selecting a record that matches your original search criteria.

Copying a Group List in the My Groups Tab

Just as you can copy the List View and Summary View into another Windows application, you can also copy the group list. You can also use the View Search Results in Microsoft Excel procedure.

1. In the Search View, select either the Groups or My groups tab.

2. Double-click on the group you want to copy.

3. Click the Copy the list to clipboard button.

4. Open the application in which you want to place the list and paste it.

You can also move the cursor to the search results pane and right-click on a name. From the options list, select Copy whole list or Copy selection to copy a single record.

Note: If you are working with a very large chart, because of its size, the Copy whole list option is not available. You can, however, use the Search feature and select the Everyone group, then copy the list to the clipboard.
Deleting a Group from the My Groups Tab

You can delete a group only from the My groups tab.

Note: There is no warning message when you delete a group. Verify that you have the correct group before you click the delete button.

1. Open the Search View pane in the List View. You can also click on the Search button in the toolbar.
2. Select the My groups tab.
3. Click once on the group you want to delete.
4. Click on the Delete Group Definition button. The group is immediately deleted from the existing groups.

Editing a Group Definition from the My Groups Tab

1. Click the Search button in the toolbar or open the Search View pane in the List View. Select the My groups tab.
2. Click the Edit Group Definition button to open the Group Editor dialog.
3. To add search criteria, click Add to copy the last criteria line, then modify it by using the And/Or, Search Field, Compare, Value, and Match Case fields. Select the values in each field and choose the option you want to use from the drop-down list.
4. When you have added all the search criteria, click Search Now to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group, the matching records display in the results pane.
5. To delete an existing group criterion, highlight the record and click Remove.
6. Save the changes to an existing group by clicking Save. Save to a new group by clicking Save As...
7. You can continue to build criteria for additional groups or click [Cancel] to close the Group Editor dialog and return to the Search View.

**Exporting and Importing Groups from the My Groups Tab**

In order to import a group successfully, the number, type, and order of custom fields in the chart receiving the import must match exactly the number, type, and order of custom fields in the chart from which the group was exported. The *Everyone* group cannot be exported or imported.

If duplicate group names are imported, OrgPublisher appends the name with a number, 1, 2, 3, etcetera. No groups are overwritten by the import process.

When exporting groups that reference other groups, verify that they reference the correct group. If a referenced group is not included in the import, the affected group will not be imported and an error message displays.

**Export a Group**

1. Open the Search View pane in the List View, or click the Search button in the toolbar. Click on the My groups tab to view the group names.

2. Click the Export groups button [ ]. The *Select Groups to Export* dialog opens.

3. Click *Select all* if you want to export all of the groups. You can clear the check boxes for groups you do not want to export, or you can click *Clear all* to clear all the listed groups.

4. Type or *Browse* to the file into which you want to export your groups, such as a file in your network drive. Type a name for the group files and click *Open*. The file extension is OCG, Group Data Files.

5. Click *Export* to send the groups to the selected file. A message displays to let you know if your groups were successfully exported.

**Import a Group**

1. Open the Search View pane in the List View, or click the Search button in the toolbar. Select the *My groups* tab to view the group names.
2. Click the Import groups button 

   The Select Groups to Import dialog opens.

3. Type or Browse to the file from which you want to import your groups. The names of the groups in the selected file display.

4. Click Select all to import all of the displayed groups to your PC. You can clear the groups you do not want to import or click Clear all if there are many groups and you want to select just a few.

5. Click Import. A message states that your groups have been successfully imported. The selected groups display in your My groups tab.

**Opening a Selected Group in the Chart View**

Your chart may contain several groups. OrgPublisher displays only one group at a time, but you can quickly select and open another.

1. Click on the group label in the Style Bar. The Filter View opens.

   ![Figure 36.](image)

2. Click on the group you want to view. The Filter View closes, and your selected group hierarchy displays in the Chart View.

Groups can be created by end users in the published chart using the Search View.
Removing a Person from a Group in the My Groups Tab

You can remove, or delete a person from a group by using the right-click menu in the Search View.

1. Open the List View and click on the Search View pane.
2. Click on the My groups tab and select the group you want to modify. The group members list displays in the lower pane.
3. Right-click on the name of the person you want to delete from the group.
4. Select Remove person from group from the options list. The name is deleted from the group.

**Note:** There is no "Undo" option for this process. If you remove a person in error, you can locate them in the chart and add them back into the group.

Saving Side By Side Profiles as a Group

You can create groups from the displayed and pinned side-by-side profiles.

1. Select the profiles you want to use as a side-by-side profile then click on the Save the current set of people as a new group button ↗.
The Enter a group name dialog opens.

2. The default group name displays as **Profile Group**. You can keep this name or type over it with the name you want to use.

3. Click **OK**. The dialog closes and the new group is included in the **Filter View**. You can select the group name from the **Filter View** to display the selected people in the **Chart View**.

### Sending Email to a Group in the My groups Tab

1. If the administrator associated an email address to a job, box, or name in the chart, and groups exist in the chart, you can send an email message to members of a group.

   **Note:** OrgPublisher defaults the maximum number of email addresses to "20." Your chart Administrator may override this number to make it more or less than the default.

2. Open the **Search View** pane of the **List View**.

3. Select the **My groups** tab and select the group you want to send an email to. (You can also select your search criteria to create and save a group for your email message.)
4. Click Send email to everyone in group button 💌. OrgPublisher opens your email client and displays the email addresses in the To field.

5. Type your message and send the email in the normal method.

**Note:** OrgPublisher looks for the first custom field of Email type when sending email to a group. If you decide to use more than one email address in your chart, the primary email must be first in the custom field sequence order.

### Spotlighting Search Results or Group in the Chart View

You can use the Chart Spotlighting feature to highlight search results in the Chart View, or dim boxes that are not part of the search results.

1. Open the Search View.

2. Select the search criteria and click 🌟 Go to begin the search.

3. When the search results display in the Search View, click the Spotlight search results in chart button 📈. The boxes in the Chart View that are not part of the search results are dimmed.

4. If you want to spotlight a specific group in your chart, click on the Groups or My groups tab in the Search View. You can spotlight any group except the Everyone group. Select the group and click the Spotlight search results in chart button 📈. The group is spotlighted in the chart.

5. Click the button again to disable the spotlight search results feature.

**Note:** When printing a chart with the spotlighting feature enabled, if your printer does not support AlplaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.

### Using the Enhanced Toolbar Search and Find Feature

The simple toolbar search feature in the OrgPublisher application and published chart has been modified.
1. The Find Next toolbar field is now labeled **Look For**. You can type in a single or multiple words.

![Look For](image)

**Figure 38.**

2. Click ![Search](image) to begin the search navigate around the chart. OrgPublisher searches on a box-to-box basis for the next instance of a matching record.

3. To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.

**Using the My groups tab in the Search dialog**

Groups saved by end users are displayed in the **My groups** tab of the **Search View** in the published chart.

You can search for and create a group using the **Search View** in the same way you can use the **Search** dialog.

The **Everyone** group, the OrgPublisher default, automatically displays in the **My groups** tab.

*Note:* When working with a very large chart, you can add new groups, but the existing groups cannot be modified or deleted. The new group cannot be displayed in the **Chart View**.

1. Open a published chart in your browser.

2. Open the **List View** and select the **Search View** pane.
Three tabs are available, **Search**, **Groups**, and **My groups**.

The **Search** tab enables you to search for specific information in the chart. You can copy the results list or save the list as a group.

The **Groups** tab displays the groups created by the OrgPublisher administrator before publishing the chart.

The **My groups** tab displays all groups saved by you, the end user, plus the default Everyone group.

3. If you haven’t already done so, conduct your search using the **Search View**.

4. When your search result is the way you want it, click the **Save as Group** button. The **Enter a group name** dialog opens.

5. Type the name of the group and click **OK**. The **My groups** tab opens and displays the new group name. Several buttons are also available.
The New Group Definition button opens the Group Editor dialog to add a new group definition.

The Delete Group Definition button deletes a selected group, and the Edit Group Definition button opens the Group Editor dialog to edit an existing group definition.

If you must change PCs, the export and import buttons enable the transfer of end user groups from one machine to another. See the Exporting and Importing Groups procedure for details.

6. To display a specific group in the published chart, open the Filter View by clicking on the groups label in the Style bar.

**Using the Smart Search Option**

The toolbar Quick Search Results dialog can be used in a Smart Search option when you pin the search results into the Search View.

1. Type a single or multiple words or initials in the Look For toolbar field.

2. Click the Go button to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the Quick Search Results dialog below the toolbar, the characters entered for the search are in bold font.

![Quick Search Results](image)

*Figure 41.*

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3. Click the Pin button in the dialog. The Search View opens, displaying the Quick Search Results list.

![Search View]

**Figure 42.**

Once you pin the Quick Search Results into the Search View, OrgPublisher identifies this as the Smart Search mode by the "pushed in" appearance of the chevron button. Hover the cursor over the button to see a tooltip indicating how to switch to the Advanced Search mode.

![Switch to Advanced Search]

**Figure 43.**

4. You can select a record right away, or click the Details button to display more information for the shown results. Click the List button to return the display to just the found records.

If you select the Detail button, the Smart Search View displays additional columns of data.
5. You can search further by typing additional letters to the original search and click Go. 

6. Once you have selected the records you want, you can also select the **Groups** tab to save the search results as a group, send the results to Microsoft Excel, send the results to the clipboard to copy and paste into another application, place the results in the **Profile View**, and more.

7. When you have completed your Smart Search tasks, click the Search Mode button to return the Search View to its original display, or **Advanced Search**, as identified by the label when you hover over the button.

---

**Figure 44.**

**Figure 45.**

You can click the button again to return to the **Smart Search** mode.
Using the Toolbar Search with Quick Search Results

The simple toolbar search feature in the OrgPublisher application and published chart has been modified.

1. Type a single or multiple words or initials in the **Look For** toolbar field.

2. Click the Go button to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the **Quick Search Results** dialog below the toolbar, the characters entered for the search are in bold font.

3. You can select a record right away, or click the Details button to display more information for the displayed results. Click the List button to return the display to just the found records.
4. To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.
Preview and Print Charts

The following items are “how-to” instructions for taking a preview look at your chart before printing it. Instructions for printing charts and performing associated tasks are also included.

**Note:** Some of these features may have been disabled by your chart administrator.

### Creating and Editing a Book Style Page Customization List

You can create a list of boxes to print at the top of pages in your Book Style printed chart. This box must be a hierarchically logical box, such as a manager’s box. An assistant's box cannot be selected as the top of a page.

1. Click the Print Preview button in the toolbar. The Print Preview Type list box opens.

2. Select the **Book style print preview** radio button and click **Show Preview**. The Book Style Print Preview window opens.

3. Make the changes in the preview you want, such as the layout style, specific pages to print, etc..

4. Click **Settings**. The **Book Style Print Settings** dialog opens.

5. Select **Page customization list**. The Book style page customization list text box opens.
6. Select the check boxes you want to save those settings and click **OK**. You can also click **Select all** to save all customized page settings.

7. Remove a customized page by selecting the corresponding check box then clicking **Remove selected items** and clicking **OK**. If you have selected all the check boxes but decide not to save the settings, click **Clear selection**.

8. Click **OK** to accept the changes or **Cancel** to discard the changes.

**Customizing the Printed Header and Footer Information**

The Header/Footer print option enables you to display a group label, modify the chart title, and the printed date and time in the header, as well as select data to display in the footer such as head count, number of open positions, and the file name and location, and more.

This dialog is also available through the **Print Preview** window.

1. Click on the Print button in the toolbar. The **Print Wizard** opens.

2. If multiple views appear in the chart, select the view you want to print. Click **Next**.

3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**. If you selected Wall Chart, proceed to Step 5.
4. If you selected Book Style, complete your selections in the *Settings* dialog. Click **Next**.

5. Click ![Header/Footer...](image) to open the *Print Header/Footer Options* dialog.

![Figure 49.](image)

6. Make your selections in both the **Header** and **Footer** tabs.

![Figure 50.](image)
7. The **Font Customization** section, in both tabs of the dialog, displays a sample of the current font used for the printed chart. You can change the font for either the header or footer, or both. Click [Select Font]. The **Font** dialog opens.

8. Select the Font, Font style and Size for your text. Your selection displays in the Sample pane of the dialog.

9. Click **OK** to accept your changes and close the **Font** dialog. Click **OK** again to close the **Print Header/Footer Options** dialog.

10. Click **Finish**. Your system **Print** dialog opens. Verify the settings to print your chart.

![Figure 51.](image)

The default chart layout in Wall Style preview is based on the number of levels displayed in the **Chart View**.

- If 2 levels are displayed:
- If there are 8 or fewer direct reports, chart layout 1 is used.
- If there are more than 8 reports, chart layout 4 is used.

- If 3 or more levels are displayed, chart layout 2 is used.

If you accept the default Wall Style preview settings, then no check is performed on the size of the chart when the preview is opened.

If you select one of the suggested Wall Style thumbnails, then OrgPublisher checks to see if the chart must be shrunk by 50% to fit on a single page when the preview. If so, then the zoom is set to 80%. In all other cases, zoom-to-fit is the default.

In addition, the Wall Style preview includes new buttons:

- Print Setup… - opens you system Print Setup dialog to select printer, paper size, orientation, and source.
- Reset to default - removes all modifications made to the preview layout and returns to the OrgPublisher default layout.
- Page optimization options - presents options, depending on the layout selected, to optimize the chart layout on the page:
  - Compact boxes - reduces the box size, field size, and drill arrow lines; shrinks box shadow.
  - Use narrow font - changes font to Arial Narrow 8pt.
  - Put employees in box with manager - Turns on Auto Build; available only when at least 1 leaf node box is visible.
  - Hide secondary fields - Turns on Compact Build mode.
  - Customize - Enabled if Hide secondary fields is selected; opens the Select fields to print dialog, displaying box fields to show or hide; the default is to print only box title and name.

**Note:** If the Advanced Box Layout Editor was used in the chart, Hide secondary fields and Customize are not available.

- Opens the Wall Style Preview Format toolbar in order to set top of chart, choose layout, move boxes, and more.

**Note:** If the Advanced Box Layout Editor was used in the chart, Hide secondary fields and Customize are not available.

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www.aquire.com
Figure 52.

- Opens the Wall Style Preview Format toolbar in order to set top of chart, choose layout, move boxes, and more.

**Previewing and Printing a Book Style Chart**

Modifications made in the *Print Preview* window enable you to fine-tune a chart for printing; for instance, by moving boxes or a selection of boxes or changing the chart layout. The *Chart View* is the only view you can preview.

1. Click on the Print Preview button in the toolbar. The *Print Preview Type* dialog opens.

2. Select *Book style print preview* radio button and click . The *Book Style Print Preview* dialog opens and the chart displays as it will print on each page. The top pane displays thumbnails of each page. The lower pane displays the selected page. The *Book Style Print Preview* enables you to format individual pages. Each page is displayed in a thumbnail.
3. The Print Preview Menu bar contains buttons that enable you to print, modify your Book Style print settings, or cancel the preview.

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Click this button to print the chart. This button opens your system Print dialog.</td>
</tr>
<tr>
<td>Print Setup</td>
<td>Click this button to open the system Print Setup dialog in order to select the printer device, paper size, orientation, and source.</td>
</tr>
<tr>
<td>Settings...</td>
<td>Click this button to open the Book Style Print Settings dialog. You can also access the Print Header/Footer Options dialog, the page customization list, or enable the Print a chart legend feature.</td>
</tr>
<tr>
<td>Cancel</td>
<td>This button closes the Book Style Print Preview dialog.</td>
</tr>
<tr>
<td>Select pages to print</td>
<td>Click this button to select specific pages to print.</td>
</tr>
<tr>
<td>Printing Tips</td>
<td>Click this link to access the OrgPublisher Printing Tips web page for ideas on successfully printing your chart.</td>
</tr>
</tbody>
</table>

4. You can use the Print Preview toolbar buttons to change the layout for the printed page, change the number of levels to print on a page, and zoom to a selected percent per page.

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click this button to select <strong>Layout 1</strong>, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.</td>
</tr>
<tr>
<td></td>
<td>Click this button to select <strong>Layout 2</strong>, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.</td>
</tr>
</tbody>
</table>

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Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.

Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

Click this button to select the number of levels from the drop-down list that you want to display.

Click this button to set the zoom percent for the chart display. The default is Zoom to fit.

Click this button to place employees in individual boxes below the supervisor box.

Click this button to place employees in a box below the supervisor box.

Click this button to place employees in the same box as the supervisor.

Click this button to place employees in the same box as the supervisor.

---

5. Click **Print** to print the chart. This button opens your system *Print* dialog.

6. Or, you can close the *Print Preview* without printing the chart by clicking **Cancel**.

**Previewing and Printing a Wall Style Chart**

Modifications made in the Print Preview window enable you to fine-tune a chart for printing, for instance, by moving boxes or a selection of boxes or changing the chart layout. Only the Chart View can be previewed before printing. Using the toolbar, you can move boxes, change box layouts, zoom in or out and select and move boxes.

1. Open the Print Preview by clicking the Print Preview button in the toolbar. The *Print Preview Type* dialog opens.

2. The default selection is the preview type you used last. Select the **Wall chart preview** radio button and click **Show Preview**. The *Wall Style Print Preview* opens.

   The preview displays the Menu bar as well as thumbnails for preview layouts.
**Note:** The connecting line moves with the box. OrgPublisher is not a drawing tool, so you do not want to move the box across from or above its manager box because the reporting line draws through it. If you select the top box in a hierarchy, all reporting boxes move as well. Remember these basic rules when moving boxes:

- Vertical lines move with the boxes.
- The boxes at either end of a row must stay at the end because the corners of the horizontal and vertical lines which link these boxes are "owned" by the boxes.
- Unexpected results occur if you move boxes outside of the OrgPublisher hierarchical drawing standards. These standards assure that an OrgPublisher chart can be viewed without written explanation and be understood anywhere in the world.

**Figure 54.**

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit a the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

**Figure 55.**

Click the thumbnail you want to use, and its layout is displayed in the preview pane.
Figure 56.

The Menu bar contains buttons that enable you to print, move from page to page, zoom in or out and change from a one page view to two page. Additional buttons are available for page optimization and advanced options.

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Click this button to print the chart.</td>
</tr>
<tr>
<td>Print Setup</td>
<td>Click this button to open the system Print Setup dialog in order to select the printer device, paper size, orientation, and source.</td>
</tr>
<tr>
<td>Next</td>
<td>If your chart will print on multiple pages, click this button to view the next page.</td>
</tr>
<tr>
<td>Prev</td>
<td>If your chart will print on multiple pages, click this button to view the previous page. This button is enabled only after you’ve clicked Next Page.</td>
</tr>
<tr>
<td>One Page</td>
<td>This button indicates your chart can print on multiple pages. Click Next Page to see a page preview. After you have clicked this button, it reads Two Page. Click to return to the single page preview.</td>
</tr>
</tbody>
</table>
## Preview and Print Charts

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two Pages</td>
<td>If your chart will print on multiple pages, this button enables you to see two pages at a time in the preview window. This button is enabled only after you have clicked <strong>Next Page</strong>. After you have clicked this button, it reads One Page to return to the single page preview.</td>
</tr>
<tr>
<td>Close</td>
<td>This button closes the Wall Chart Print Preview dialog.</td>
</tr>
<tr>
<td>Reset to default</td>
<td>Click this button to reset the chart boxes with employees and supervisors in normal build.</td>
</tr>
<tr>
<td>Printing Tips</td>
<td>Click this link to access the OrgPublisher Printing Tips web page for ideas on successfully printing your chart.</td>
</tr>
<tr>
<td>Show All chart levels</td>
<td>Click this button to select the number of levels from the drop-down list that you want to display.</td>
</tr>
<tr>
<td>Page optimization options</td>
<td>Click this button to display the check box options for optimizing chart boxes on a page. Options vary, depending on the selected layout.</td>
</tr>
<tr>
<td><strong>Compact boxes</strong></td>
<td>reduces the box size, field size, and drill arrow lines; shrinks box shadow.</td>
</tr>
<tr>
<td><strong>Use narrow font</strong></td>
<td>changes font to Arial Narrow 8pt.</td>
</tr>
<tr>
<td><strong>Put employees in box below manager</strong></td>
<td>available only when at least 1 leaf node box is visible; displays reporting employees in a box below assigned manager.</td>
</tr>
<tr>
<td><strong>Hide secondary fields</strong></td>
<td>turns on Compact Build mode.</td>
</tr>
<tr>
<td>Customize</td>
<td>enabled if Hide secondary fields is selected; opens the Select fields to print dialog, displaying box fields to show or hide; the default is to print only box title and name.</td>
</tr>
<tr>
<td>Show Advanced Options</td>
<td>Click this button to display the preview Advanced toolbar.</td>
</tr>
<tr>
<td>Hide Advanced Options</td>
<td>Click this button to hide the preview Advanced toolbar.</td>
</tr>
</tbody>
</table>

Wall Style preview contains an advanced toolbar, which offers additional flexibility and control. The toolbar buttons include:

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Click this button to reverse the latest action. May be repeated to undo additional actions.</td>
</tr>
<tr>
<td>📢</td>
<td>Click this button to copy the chart displayed in the preview to another application. Photos in the chart are also copied using this button.</td>
</tr>
<tr>
<td>🔐</td>
<td>Clicking this button designates the selected box as the top of your chart for the selected style.</td>
</tr>
<tr>
<td>🎨</td>
<td>Click this button to display the chart from the highest box in the hierarchy.</td>
</tr>
<tr>
<td>💼</td>
<td>Click this button to select <strong>Layout 1</strong>, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Button</th>
<th>Action Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Button" /></td>
<td>Click this button to select <strong>Layout 2</strong>, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.</td>
</tr>
<tr>
<td><img src="image2" alt="Button" /></td>
<td>Click this button to select <strong>Layout 3</strong>, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.</td>
</tr>
<tr>
<td><img src="image3" alt="Button" /></td>
<td>Click this button to select <strong>Layout 4</strong>, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.</td>
</tr>
<tr>
<td><img src="image4" alt="Button" /></td>
<td>Click this button to move the entire Chart View to the left.</td>
</tr>
<tr>
<td><img src="image5" alt="Button" /></td>
<td>Click this button to move the entire Chart View to the right.</td>
</tr>
<tr>
<td><img src="image6" alt="Button" /></td>
<td>Click this button to move the entire Chart View up.</td>
</tr>
<tr>
<td><img src="image7" alt="Button" /></td>
<td>Click this button to move the entire Chart View down.</td>
</tr>
<tr>
<td><img src="image8" alt="Button" /></td>
<td>Click this button to set the zoom percent for the chart display.</td>
</tr>
<tr>
<td><img src="image9" alt="Button" /></td>
<td>Click this button to show or hide the header text.</td>
</tr>
<tr>
<td><img src="image10" alt="Button" /></td>
<td>Click this button to show or hide the footer text.</td>
</tr>
<tr>
<td><img src="image11" alt="Button" /></td>
<td>Click this button to open the Print Header/Footer Options dialog and select your print options.</td>
</tr>
<tr>
<td><img src="image12" alt="Button" /></td>
<td>Click this button to print a chart legend.</td>
</tr>
<tr>
<td><img src="image13" alt="Button" /></td>
<td>Click to display or hide the drill buttons for printing.</td>
</tr>
</tbody>
</table>

3. Use the toolbar buttons to set top of chart, display the whole chart, change the layout for the printed chart, move individual boxes, move the chart left, right, up or down, zoom in or out, show or hide headers and footers, print a chart legend, even open the **Print Header/Footer Options** dialog.

4. Click ![Print](image14) when you are ready to print the chart.

Or, you can close the **Print Preview** without printing the chart by clicking ![Close](image15) or Esc.
Printing a Chart Legend

If you use several group or custom icons in your chart, you can choose to print a chart legend when you print your chart using the Print Wizard or the Print Preview. The chart legend does not display in the Print Preview, but the option to print it is available.

1. Click the Print button. The Print Wizard opens.

2. Follow the wizard dialogs to print either in Wall chart or Book style.

3. The last dialog enables you to choose header or footer options. If you select the Include Legend check box, your printed chart includes the legend on each page of your chart.

4. Click Finish to close the wizard and print your chart.

If you are using the Print Preview option and a legend appears in your chart, you can use the Print legend button in the Wall Chart style preview or select the Print Legend check box in the Settings dialog of the Book style preview.

The legend prints on one page in Wall style and on every page in Book style. You may need to make adjustments in your chart for the size of the legend so that it does not print over boxes.

Printing a Workforce Analysis Graph

Your chart administrator may include a workforce analysis graph in the chart.

1. In the Summary View, select the Graphs tab.

2. Click the Print button in the Main toolbar. The Print Wizard opens.

   ![Print Wizard](image)

   Figure 57.

   If you have more than one graph, each graph prints one to a page.
3. Select **Summary View** and click **Next**.

4. Click **Finish** to print the graph. The printed graph displays whatever is shown in the **Graphs** tab, such as a legend or categories.

**Printing the Published EChart as PDF**

When the published EChart is opened and the Send to PDF button displays in the toolbar, you can print the chart as PDF.

![OrgPublisher](image)

**Figure 58.**

1. Open the published chart. Verify that the Send to PDF button is enabled, as highlighted in the sample above.

2. Click the button to create a PDF of the chart. A dialog opens that allows you to select the **Number of OrgChart levels** to print.

   In addition, you can choose whether or not to **Include index**, a version of the **List View**.

3. Click **OK** when you have made your selections. A **File Download** dialog opens. You can **Open the PDF** immediately or **Save** the document to a folder of your choice.

   When you open the PDF, the index is at the beginning of the document, if you elected to include an index.

   The printed chart follows, displaying as many levels as you selected.

**Selecting Pages to Print in a Book Style Preview**

You do not have to print the entire book in the Book Style Print Preview - you can select just the pages you want to print.

1. Click the **Print Preview** button in the toolbar.

2. Click **Show Preview**. The **Book Style Print Preview** dialog opens, and the chart displays as it will print for each page. The box with the yellow border indicates the current view shown in the preview.
3. Click [Select pages to print] to enable the selection of specific pages for printing. The **Selective printing mode enabled** message dialog opens, notifying you that the selective printing mode is enabled. You can choose not to display the message again by selecting the **Don't show this dialog again** check box.

4. The individual page thumbnails now include a printer icon.

![Figure 59.](image)

5. Select the pages that you do NOT want to print. The print icon changes.

![Figure 60.](image)

6. If you choose not to print only selected pages, click [Cancel print page selection]. You can also right-click on a printer icon to use the context menu. Options are **Select all pages to print** and **Clear all pages**.

   If you choose to print the selected pages only, click [Print].

**Sending the Chart to Microsoft PowerPoint**

With OrgPublisher you can copy the chart directly to Microsoft® PowerPoint. This provides enhanced chart graphic quality and flexibility within PowerPoint presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

**Note:** This feature disables the header and footer options, as well as the index or chart legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.
1. The Main toolbar, click the Send to Microsoft PowerPoint button. The Microsoft PowerPoint Preview dialog opens.

2. Select either the Wall chart preview or Book style preview radio button. Click OK. The Microsoft PowerPoint Preview window opens.

3. Make your modifications in the Wall style or Book style preview. If you click Settings in the Book Style preview, the Book Style PowerPoint Settings dialog opens. Follow the Choosing Book Style Print Settings procedure to choose the PowerPoint settings.

4. Click Send. The Send to PowerPoint dialog opens.

5. In the Page Range section, select which pages you want to send to PowerPoint, Current Page, All Pages, or Pages and enter the page numbers or range.

6. In the Chart Options section, select the optional chart features you want to send to PowerPoint. These features include Show Drill Buttons, Chart Title, which allows you to choose Title is part of image or Title is part of slide, and Chart Background, which allows you to choose Background is part of image or Background is part of slide.

7. In the PowerPoint Options section, the default is Use currently open presentation. Clear this check box if a current presentation does not exist or you want to choose a different presentation.

8. In the Image Options, select Copy as metafile or Copy as bitmap.

9. Click OK once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.
**Using Print Preview Enhancements to Print Charts**

The OrgPublisher Print Preview features have been enhanced to provide more chart printing options. You can see detail of all the enhancements in the *Previewing a Book Style Chart* and *Previewing a Wall Style Chart* topics.

When working with a published Thin Client chart, OrgPublisher also provides a popup option to select the number of levels to print.

**Book Style preview**

Both the Wall style and Book style previews now contain a Print Setup button for easier access to your print client.

The Book Style preview now provides the ability to print all levels of the chart using the Levels button.

The Book Style *Print Settings* dialog includes the Header/Footer button to open the *Print Header/Footer Options* dialog in order to configure the header and footer display.

**Wall Style preview**

The Wall Style Preview has been configured to provide the preview and print controls at the top of the window. The controls also provide a section with thumbnails that give you an idea of what your chart will look like when you select a specific layout.

![Figure 62.](image)

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit a the page. The first thumbnail shows the current default setting for the preview.

The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.
Click the thumbnail you want to use, and its layout is displayed in the preview pane.
Organizational Planning for Administrators

**Note:** The topics in this section are intended only for planning chart administrators.

This topic covers organizational planning; see the *Work with Succession Planning* topic for details about succession charts. Planners can create a new planning chart, modify an existing chart, or delete a chart using the Planning button.

**Note:** When you create a planning chart, verify that the box you have selected as top of chart is correct. Once the planning chart is created, drilling up from the designated top of chart is not available.

Planning charts do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the advanced box layout settings.

In addition to most of the basic chart functions as described in the *Making the Chart Work for You* topic, the planning-enabled chart menu and toolbar also offer several new options to planners which enable you to create, modify, or delete planning charts, as well as generate a change report or view a revision history.

The Organizational Planning feature is intended to provide organizational modeling opportunities. This page contains some provisions you should remember when publishing planning-enabled charts.

- Only one person can work on a specific planning chart at a time.
- Employees cannot be renamed. Names can be cut and pasted, and unassigned employees in ECharts can be selected to add to the chart.
- New custom fields cannot be added.
- Fields displayed only in the Profile View cannot be modified.
- Formatting options and styles are disabled.
- Employees and boxes cannot be copied, only cut and pasted.
- End users can email a planning chart to another planning user.
- If data modifications are noted when a chart is saved, the end user is prompted to enter a description for the revision history.
Creating a New Planning Chart

1. Open the planning-enabled chart in the web browser and click the Planning button. (This button may vary, depending on the type of planning charts selected.)

2. You may have to select the type of planning chart you want to create from the options list, Organizational Planning or Succession Planning. The Organizational Planning Charts dialog opens.

3. Click New. The dialog indicates where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance your chart administrator may publish the chart for you to work from your box down.

4. The planning chart name defaults to "OrgPlan for" and names the top person in the chart, as well as the name of the original chart. Type a name for the chart if you do not want to accept the default name.

5. If not already enabled by the chart administrator, you can select the Password protect this chart check box to require typing a password whenever the chart is opened.

6. Type the Password then Retype password.

7. If you want a shortcut to the planning chart to display on your desktop, select the Create a shortcut to the chart on my Windows desktop check box.

8. Click Create and edit chart. The browser opens the Organizational Planning chart with the Insert Toolbar, the Generate a change report, and email buttons enabled.

Figure 63.

The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the local hard drive or the web server.
Deleting a Planning Chart

1. Open the planning-enabled published chart in the web browser. Click the Planning button.
2. You may have to select the type of planning chart you want to create from the options list, Organizational Planning or Succession Planning. The Organizational Planning Charts dialog opens.
3. Select the chart from the list and click **Delete**.  
   A message states that the task cannot be undone and verifies that you want to delete a planning chart.
4. Click Yes. A message verifies that the selected chart has been deleted.

Managing Planning Charts

When viewing a published planning enabled chart, you can manage the planning charts.

When you click the Launch planning charts button the first time, the standard create a chart dialog opens.  
If a planning chart already exists, you see the list of existing charts. You can create a new planning chart, select a chart to open, or or select a chart to delete.

Opening a Planning Chart

1. Open the planning-enabled published chart in the web browser. Click the Planning button.
2. You may have to select the type of planning chart you want to create from the options list, Organizational Planning or Succession Planning. The Organizational Planning Charts dialog opens.

3. Select the chart you want to open and click Open. The selected chart opens in the same browser window.

**Storing Planning Charts**

When a secured EChart is published using the Organizational Modeling feature, you can store your planning charts either on the end user's PC or the EChart web server. When using the server option, each end user automatically has access to planning chart information that exists at or below the user's box in the hierarchy.

Storing the planning charts on the server makes sharing them very easy, but, possibly, makes the information in them highly vulnerable. It is essential that the folder in which they are stored is properly secured.

**Note:** Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.

1. In the planning chart, select File from the Main menu then Preferences from the options list. The Preferences dialog opens.

![Preferences dialog](image)

**Figure 64.**

The dialog displays the default locations set by the IT administrator. With appropriate permissions, you can select to store the planning chart on a local drive or a network location.

2. Type or browse to the folder on the server to store planning charts, and verify that the folder is secure - accessible to the EChart server but not to HTTP requests. If you are in doubt, contact your IT administrator.

3. Click OK to save the specified folder and return to the planning chart.

If you are in doubt about the security, contact your IT administrator.
Succession Planning for Administrators

**Note:** This topic is intended only for succession planning chart administrators.

With OrgPublisher Premier, planning administrators can create a new succession planning chart, modify an existing chart, or delete a planning chart. End users, selected individuals or planners, can create and share succession charts. Special formatting is automatically assigned to successor position types by OrgPublisher.

Succession planning charts work closely with the 9 Box Matrix, and Side-by-side Profiles. The planning administrator creates a planning chart by selecting the Succession Planning option.

Planners can modify any data fields displayed in the *Chart View*. Data fields that cannot be modified are displayed in the *Profile View*.

Succession planning charts can be saved to the end user's local hard drive or to your web server in a subfolder automatically created by OrgPublisher. End users can see a list of planning charts created by themselves and their subordinates. If more than one user tries to open the same chart, a message notes that someone else is modifying the chart and a read-only option is available.

Planning charts offer several options to end users which enable them to modify and save planning charts, as well as generate a change report or view a revision history.

**Adding a Succession Candidate to a Box**

When you create a succession planning chart, the chart opens with no hierarchical information included because this type of chart is meant to help you plan for successors to specific positions within your company.

**Note:** Succession candidates are not included in head counts or summaries.

1. In the *Chart View*, drag and drop individuals from their current box into the box of the position for which they are candidates.

2. Save the chart with your changes.
Creating a New Succession Planning Chart

1. Open the planning-enabled chart in the web browser and click the Planning button. (This button may vary, depending on the type of planning charts selected.) The Succession Planning Charts dialog opens.

2. Click New. The New Succession Planning Chart dialog opens. If a current succession planning chart does not exist, the dialog opens as soon as you select the planning button.

3. Type a name for the chart if you do not want to accept the default, OrgSuccession for... title.

4. If not already enabled by the chart administrator, you can select the Password protect this chart check box to require typing a password whenever the chart is opened.

5. Type the Password then Retype password.

6. If you want a shortcut to the planning chart to display on your desktop, select the Create a shortcut to the chart on my Windows desktop check box.

7. Click Create and edit chart. The browser opens the succession planning chart with the select toolbars, the Generate a change report, and email buttons enabled. See the Generating a Change Report procedure for detailed information.

Creating Side-by-Side Profiles

Side-by-Side Profile View allows the you to look at multiple profiles at the same time. See also, Saving Side-by-Side Profiles as a Group.

1. Open the Profile View. The profile for the top box appears.

2. Select the person in the chart you want to see in the side-by-side Profile View. The profile opens in the Profile View.

3. Click the pin button in the upper right corner to anchor the profile. The profile is anchored and moved to the right, and a placeholder is created on the left for the next profile.
4. Click on another person’s name, job title, or box title (depending on the data you are profiling; you want to compare like data fields) to populate the placeholder with the selected person’s information.

5. If the added profile is pinned, both pinned profiles move to the right, and an additional placeholder appears.

6. Continue selecting and pinning the profiles you want, repeating Steps 2-4.
Printing a 9 Box Matrix

You can print the 9 Box Matrix which is, typically, included in succession charts.

1. Open your chart then open the 9 Box Matrix.

![Figure 67. 9 Box Matrix](image)

2. Click the Print button in the Main toolbar. The Print Wizard opens.

![Figure 68. Print Wizard](image)

3. Select 9 Box Matrix and click Next.

4. Click Header/Footer... if you want to modify the header and/or footer for the print matrix.

5. Click Finish to print the view.
The printed 9 Box Matrix includes the designations for each box, such as High Performance-High Potential or Average Performance-Low Potential.

**Searching for Person Succession Counts**

The Person succession count uses the employee ID and position type of <SC> to determine if a person is slated for more than one position. Your organization may want to see everyone slated for more than one position. You may also want to create groups showing people slated for 2 positions, 3 positions, etc.

**Note:** The results show only the <SC> record, not an entry for the successor's standard position. In addition, this is a compound search.

The Person succession count search option first goes through the data to find all <SC> records in the chart. The resulting <SC> records are searched a second time is to see if any employee IDs appear on the list more than once.

Accurate employee IDs for each record must exist in your data in order to use this option.

1. Open the Search dialog by clicking Search.
2. If you have selected a specific box in the Chart View, the Search dialog selects the Search under selected box check box. This begins the search at that point in the chart. If you want to search the entire chart, click the Search under selected box check box to clear it.

3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the Chart View and then select the Search under check box. This begins the search at that point in the chart.

4. Select the All Fields tab.

5. In the Search field, click the drop-down arrow to select Person successor count. You can also press the key of the first letter of the field you want to navigate through the list.

6. In the For field, type the number you want to search on. For instance, if you want to see how many positions contain more than one successor, type the number 2.

7. In the Match field, click the down-arrow to select = Any Part of Field.

8. Click Search Now or Go. OrgPublisher performs the search and displays the matching records in the lower pane.

9. You can save the search results as a group or perform an additional search.

**Searching for Successors in a Box**

This search option provides a list of people in a box containing a selected number of successors, and helps you locate where you have no successors or too many successors for a specific position.

1. Open the Search dialog by clicking the Search button in the toolbar.

2. If you have selected a specific box in the Chart View, the Search dialog selects the Search under selected box check box. This begins the search at that point in the chart. If you want to search the entire chart, click the Search under selected box check box to clear it.

3. If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the Chart View and then select the Search under check box. This begins the search at that point in the chart.

4. Select the All Fields tab.
5. In the **Search** field, click the drop-down arrow to select **Successor(s) in a box**. You can also press the key of the first letter of the field you want to navigate through the list.

6. In the **For** field, type the number of successors in a box you want to find. For instance, if you want to see all boxes that contain more than one successor, type 1.

7. In the **Match** field, click the down-arrow to select **= Whole Field**.

8. Click **Search Now** or **Go**. OrgPublisher performs the search and displays the matching records, successors and managers in the box in the lower pane.

9. You can save the search results as a group or perform an additional search.

**Viewing the 9 Box Matrix**

The matrix is either displayed in the chart or the 9 Box Matrix button is enabled in the toolbar to open the view.

- Open your chart. If the matrix is not displayed, click the 9 Box Matrix button. The 9 Box Matrix opens.

![Figure 70](image-url)